



BF Billing Shipping and Personal Info.doc

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1 Modification History

Date	Who	Comments
12-Dec-13	Solveda	Initial

2 Introduction

2.1 Overview

- This document will describe the capture of data for 3 keys areas:
 - Billing Address
 - Shipping Address
 - Personal Information
- These sections are used within:
 - Check Out (both multi-page and single-page)
 - User Registration
- The functional purpose is to have an intelligent interaction between these sections in order to streamline the check-out and registration processes
- Specific functionality for "Same As Billing" is included in this document

3 Same As Billing

3.1 UI Guideline, default presentation

Billing Address (Where is your credit card statement sent?)	
* Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
* City:	<input type="text"/>
* State:	<input type="text" value="Drop down"/>
* Zip:	<input type="text"/>

Shipping Address (Where would you like your items shipped?)	
<input checked="" type="checkbox"/> Same as Billing	

- The "Same As Billing" will be checked for any initial presentation

3.2 Un-checking "Same As Billing"

Billing Address (Where is your credit card statement sent?)	
* Address 1:	<input type="text" value="1 Main St"/>
Address 2:	<input type="text"/>
* City:	<input type="text" value="Mineola"/>
* State:	<input type="text" value="New York"/>
* Zip:	<input type="text" value="11501"/>

Shipping Address (Where would you like your items shipped?)	
<input type="checkbox"/> Same as Billing	
* Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
* City:	<input type="text"/>
* State:	<input type="text" value="Drop down"/>
* Zip:	<input type="text"/>

3.3 Key Processing

- The act of checking the "Same As Billing" will hide the details in the Shipping section
- Upon any "Continue", or equivalent action, if the "Same As Billing" is checked then the Billing details are used to populate the Shipping details at the time of processing
 - In other words, the usage of the "Same As Billing" is NOT an action to copy details from Billing to Shipping upon checking the box
- Example:
 - "Same As Billing" is checked by default
 - User enters the following data in the Billing section
 - Address-1: 1 Main Street
 - City: Mineola
 - State: New York
 - Zip: 11501
 - User un-checks "same as billing"
 - User enters the following data in the Shipping section
 - Address-1: 77 Blue Avenue
 - City: Bluetown
 - State: New York
 - Zip: 11987
 - User checks the "same as billing", shipping details are hidden
 - User clicks on "Continue" button
 - BOTH the Billing and Shipping sections will contain the SAME data because the "Same As Billing" is checked at the time of processing, even though the underlying (hidden) details are different:
 - Address-1: 1 Main Street
 - City: Mineola
 - State: New York
 - Zip: 11501

3.4 Other Considerations

- Computation of Shipping Charges and Taxes are dependent on the Shipping Address
- Therefore, when the "Same As Billing" checkbox is clicked the system will need to retrieve the Billing Address for these computations

4 Intelligent Attribute Sharing

4.1 Overview

- See spec "BF Admin Module DIV Sequencer.doc", specifically:
 - PersonalInfo
 - BillingAddressInfo
 - ShippingAddressInfo
- These sections all have options to define the superset of attributes in order to provide maximum flexibility
- Within a specific implementation there is typically a need to prompt for Billing, Shipping and Personal Information
- Often this involves prompting for First Name, Last Name and Telephone number in one or more of these "sections"
- The bigFish implementation should be able to determine how to intelligently share (or re-use) this information from one section into another

4.2 Implementation Features

- This will provide considerable flexibility when prompting for information during Registration or Checkout. For example:
 - Implementation may only prompt for 2 of these sections, reducing time and increasing ease during customer checkout
 - E.g. Steven Singer wants to prompt for Billing and Shipping during checkout, PersonalInfo will be prompted on the Order Confirmation page (will be supported in the future)

4.3 Mappings

- **TODO – possibly not required**
- This section will show how Billing First-Last-Phone; Shipping First-Last-Phone and Personal-First-Last-Phone are mapped to OFBiz entities

4.4 Examples:

- #1 Billing and Personal contain First and Last Name
 - Billing Address (used for credit card verification)
 - First Name (* mandatory)
 - Last Name (* mandatory)
 - Personal Information
 - First Name

- Last Name
- Customer Action
 - Billing First and Last Name are completed
 - Personal First and Last Name are empty
 - Click "Submit"
- Result
 - Billing First and Last Name are used for the credit card verification
 - Billing First and Last name are used to populate the Personal Information First and Last name
 - NOTE: this result would also be true if the Personal Information First and Last name is hidden via the DIV sequencing strategy
- #2 Only Personal Information has First, Last and Phone
 - Billing Address (used for credit card verification)
 - Address only fields exposed
 - Shipping Address (used for credit card verification)
 - Address only fields exposed
 - Personal Information
 - First Name
 - Last Name
 - Phone#
 - Customer Action
 - Completes Billing and Shipping Address
 - Completes Personal Information section
 - Click "Submit"
 - Result
 - Billing First and Last Name are retrieved from Personal Information for the cc verification
 - Personal Information First, Last and Phone are used for the user profile
- #3 Only Personal Information has Address exposed
 - There is no real concept of an Address within the Personal Info
 - But if the address were exposed within the PersonalInfo section and hidden in the BillingAddressInfo and ShippingAddressInfo then the address would be used for BillingAddress and ShippingAddress

4.5 Implementation Assumptions

- This section will list assumptions that should guide the implementation and testing
 - It has to be understood that by allowing a great deal of flexibility that it will be possible to "break" any implementation but that would only be when configuring an unrealistic scenario
- At least one of 3 sections will prompt for First and Last Name

- Ultimately this is required information and whether First and Last Names are included on Billing, Shipping or Personal they will have to be exposed within at least section
- One section will prompt for key attributes such as AllowSolicitation, EmailPreferences etc

5 Reference Implementation: SSJ

5.1 “Express” Single Page Checkout

- For additional context, here is a reference example for an “express” Single-Page-Checkout

Billing Address (Where is your credit card statement sent to?)	
First Name	[entry]
Last Name	[entry]
Company	[entry]
Address 1	[entry]
Address 2	[entry]
City	[entry]
State	[drop-down]
Zip	[entry]
Country	[drop-down]
Phone Number	[entry]

Shipping Address (Where would you like your items shipped?)	
Same as Billing <input checked="" type="checkbox"/>	

Shipping Options
Available Shipping Options displayed

Payment Information
Payment Options displayed including Gift Card

- Keys
 - Personal Information section completely hidden
 - Phone Number displayed in Billing-Address will be used as Personal Information